FORMS MANAGEMENT PROGRAM

COMPLIANCE WITH THIS PUBLICATION IS MANDATORY

Maintain and dispose of records created as a result of prescribed processes in accordance with *AFMAN 37-139, Records Disposition Schedule.*

AFI 33-360, Volume 2, 27 June 2000, is supplemented as follows:

SUMMARY OF REVISIONS

This supplement has been substantially revised and must be completely reviewed. Paragraphs have been renumbered to correspond with the superseding of *AFI 37-160, Volume 8*, by the new series *AFI 33-360, Volume 2*. It expands on the guidance provided in AFI 33-360, Volume 2, and applies to all Hill AFB personnel who develop forms to collect data.

1.1.7. (Added). Computer technologies enable users to design forms and manipulate and display information in new ways. The definitions and functions of electronic forms are the same as for paper forms with some changes in how they are managed.

1.5.7. The office of primary responsibility (OPR) will notify the base forms manager by an *AF Form 1382, Request for Review of Publication and/or Form(s)*), or by other written means, citing any replacement for the form made obsolete.

1.7. The 75th Communications Squadron Publishing Management office *(75 CS/SCSP)* will serve as the base forms manager focal point for instructions, procedures, and policy as it relates to the overall forms management program at Hill AFB. The base forms manager is designated as the focal point for designing, analyzing and printing authority for all base forms. The 75th

Medical Group will appoint a forms monitor to process requests for development, revision or review of their clinic forms to the base forms manager for evaluation, approval/disapproval, or design.   The 75th Medical Group Forms Monitor will review each new or revised form, overprints of forms, reproduction of forms, and form letters originating within their organization, and disapprove those that do not meet the criteria of this publication.

1.7.8. At Hill AFB the base forms manager will serve as the approval authority for reproduction of Departmental, AFMC, and Hill AFB forms.   Those forms, which include postal design elements, will require coordination through the official mail manager, Administrative Communications *(75 CS/SCSA),* prior to approval.

1.7.20. (Added). The 75 CS/SCSP will publish a forms numerical index (*Hill Index 9, Numerical Index of Hill AFB Forms*) semi-annually.

2.2.3. Hill AFB does not manage surveys, critiques, or questionnaires, relating to "how am I doing" or "customer satisfaction" as numbered forms.

2.2.6. Hill AFB does not manage quizzes or test materials as numbered forms unless the Hill AFB Forms Manager deems it more advantageous to do so.

2.2.7. (Added) Hill AFB does not manage organizational identification badges as numbered forms unless the Hill AFB Forms Manager deems it more advantageous to do so.

2.3.1. Hill AFB forms will carry an identifier of OO-ALC.

2.3.3. Hill AFB forms are available for download from the Hill AFB Publishing Distribution Library (PDL) via the World Wide Web (http://www.hill.af.mil/scsweb/pdl). Paper versions of Hill AFB electronic forms will not be stocked nor issued at this installation. Availability of paper versions will be on a fee-for-service basis only.   Users who require paper stock replenishment *(reproduction)* of Hill AFB electronic forms will be required to prepare and submit a printing request (*DPS Form 5600, Duplicating/Reproduction Request*) with written justification to the 75 CS/SCSP, for approval. The design or size of electronic forms may not be altered during the reproduction process without written approval from the forms functional OPR. Those forms not approved for electronic generation will be stocked and issued (S&I) by the forms functional OPR.

3.1.1. Hill AFB forms must be prescribed in a base directive publication or identified as a process requiring data collection in a miscellaneous publication.

3.3.1. Hill AFB Forms. The functional OPR sends one copy of a completed *DD Form 67, Form Processing Action Request,* for each new or revised form to the 75 CS/SCSP *(see Attachment 4 (Added)* of this supplement for instructions on how to complete the *DD Form 67)* for processing. Along with the completed DD Form 67 a draft of the form, a filled-in sample copy of the form, and a copy of the paragraph from the publication that prescribes the form must be included in the

request package. The forms monitor for the 75th Medical Group will act as liaison between OPRs at the Base Clinic and the base forms manager. OPRs at the Base Clinic will submit form request packages to the 75th Medical Group Forms Monitor for processing to the base forms manager.

3.10. When applicable, the 75th Medical Group may use a blanket Privacy Act Statement of "*This form is subject to the Privacy Act of 1974, Use DD Form 2005*" on clinic forms.

3.11. The 75 CS/SCSP will provide only the information collection portion of forms requiring United States Postal Service elements. Postal design elements will be obtained from the base mail manger, *75 CS/SCSA*.

3.13.1.5. For Hill AFB forms the Hill AFB Forms Manager and the forms OPR have the final authority to disapprove any IDEA recommendations exclude in paragraph 3.13.1.

4.2. The 75 CS/SCSP will maintain a functional file in a combination of paper and electronic media to expedite the functional analysis required to detect duplication of forms prior to development or revision of base forms.

Attachment 1, Terms. **Office Forms** – Hill AFB office forms are to be used within one organizational element and may not cross directorate lines nor be made available for access or use from outside that organization *(i.e., public or limited access web sites)*. They will be stocked, issued, and managed by the originating office. They will not be indexed in the *Hill Index 9, Numerical Index of Hill AFB Forms*, nor retain a designator of "OO". On-hand stock of existing "OO" designated office forms may be used until exhausted. Upon reprint, the office of primary responsibility (OPR) is required to replace office form designator of "OO" with organizational office symbol designator and date (i.e., *75 CS/SCSP FORM 1, MAR 97*, date of form to be changed each time form is revised). For stock replenishment *(reproduction)* of office forms, a printing request will be initiated by the issuing or using organization and sent to the 75 CS/SCSP for printing approval. Office forms that are subject to Privacy Act Information are required to be coordinated with the Base Privacy Act Officer *(75 CS/SCSRF)* prior to use. The 75 CS/SCSP will provide design support with the Air Force-directed design software for Hill AFB office forms *(see paragraph 3.3.1 of this supplement for processing requirements)*.

Attachment 1, Terms. (Added) **Clinic Forms** – Hill AFB Clinic forms will be identified as *OO-ALC 7000 series forms*. These forms will be stocked and issued or stocked and used by the forms OPR. Users may obtain paper or electronic version, when applicable, of these forms from the forms functional OPR.

Attachment 1, Terms. (Added) **Modified Overprint** – An overprinting of required information with captions and spaces to an existing form tailored to meet specific organizational unique requirements. The forms OPR must provide written approval for these unique modified

overprints. Modified overprints will be used to save time and effort that would go into creating a new form.

Attachment 1, Terms. (Added) **System Generated Forms** – A form created by a functional area system that is approved by the forms OPR and identified in a prescribing directive.

Attachment 4 (Added). DD Form 67, Form Processing Action Request, Instructions

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ATTACHMENT 4 (ADDED).

DD FORM 67, FORM PROCESSING ACTION REQUEST

Functional Offices of Responsibility (OPRs) are required to complete and provide one copy of a *DD Form 67* for each new, revised, electronic form, and/or change in construction to an existing form.

Block 1 - TYPE SUBMISSION: Place an "X" in the appropriate block.

Block 2 - FORM DESIGNATION AND NUMBER: Hill AFB forms will carry an identifier of OO-ALC; therefore, provide form designation and number being revised (i.e., <u>OO-ALC</u> 000). If form is new leave blank, the base forms manager will assign the number.

Block 3 - DATE OF FORM: Leave blank, the base forms manager will complete when the form is finalized.

Block 4 - FROM: Organizational symbol of functional OPR. When requesting a Hill AFB form, we do not need the complete mailing address.

Block 5 - THRU: For Hill AFB forms, leave blank *(not required).* Clinic Forms, coordination must be accomplished through the 75th Medical Group Forms Monitor, 75 MDSS/SGSO.

Block 6 - TO: 75 CS/SCSP for Hill AFB forms.

Block 7 - FORM TITLE: Existing or proposed title of form.

Block 8 - SUPERSEDED FORMS *(If applicable)***:** If you are revising an existing form, complete blocks 8a through 8c.
    8a - FORM NUMBER: Enter number of each superseded form.
    8b - EDITION DATE: Provide edition date of each superseded form.
    8c - DISPOSITION: Provide disposition instructions for each superseded form.
        •*Use - Obsolete form may be used until existing stock exhausted or for one year after obsoletion date.*
        •**Do not use** *- Do not use and salvage existing stock.*

Block 9 - PRESCRIBING DOCUMENT NUMBER *(Attach Copy)***:** Enter the number of the prescribing directive. Hill AFB forms must be prescribed in a standard publication according to procedures outlined in *AFI 33-360, Volume 2,* or identified as a process requiring data collection in a miscellaneous publication. Attach only the chapter/paragraph referencing prescribed form or process.

Note: For base publications, only the OPR of the base publication may be the OPR of the form prescribed in their publication.

Block 10 - FUNCTIONAL CODE: Leave Blank, the base forms manager will assign the functional code.

Block 11 - TYPE OF FORM: Mark Prescribed. Air Force only allows use of prescribed forms in standard or specialized publications. Therefore, Hill AFB forms are to be shown as prescribed, not adopted, in the publication.

> •*Prescribed - a form required to be used by any standard or specialized publication.*
> •*Adopted - a form prescribed in one publication and adopted for use in another*
> *publication.*

Block 12 - DESIGN CONSIDERATIONS: Here is where you specify the size classification and any other special construction criteria.

> **12a - SUGGESTED SIZE:** Normal form sizes are 8½" X 11" or 11" X 8½, cards are 8 ½" X 5 ½". OPRs must justify in writing to the base forms manager when larger size forms are necessary.
> **12b - SPECIAL CONSTRUCTION REQUIRED:** If yes, written justification is required.
> **12c - IS FORM CLASSIFIED?:** A form is classified when it contains sensitive or classified information.
> **12d - IS FORM CONTROLLED?:** A form must be controlled if it is classified or is serially numbered.
> **12e - IS FORM AUTHORIZED FOR ELECTRONIC GENERATION?:** OPR of the form has option of authorizing electronic generation which means the form may be approved for electronic fill-in capability. When possible, Hill AFB forms should be authorized for electronic generation to comply with the Paper Reduction Act of 1980.

Block 13 - PURPOSE AND DESCRIPTION OF USE: A complete functional statement is to include a key statement to get the form to the intended users. Describe how the form will be used, who uses it, where it is sent, who files it, etc. This is especially important when you're requesting a new form.

Block 14 - INTERNAL COORDINATION AND CONCURRENCE: Ensure internal coordination and concurrence are completed when and if applicable. If the form requests information subject to the Privacy Act, get coordination from the Base Privacy Act Officer (75 CS/SCSRF). The Base Privacy Act Officer can advise if OMB approval is needed.

Block 15 - INTERNAL COORDINATION AND CONCURRENCE: Leave blank, not required.

Block 16 - DOD COMPONENT OPR AND/OR ACTION OFFICER

16a - TYPED NAME: Type name of functional OPR.
16b - SIGNATURE: Signature of functional OPR.
16c - TELEPHONE NO.: Telephone number of functional OPR.

Block 17 - DOD COMPONENT APPROVING OFFICIAL
17a - SIGNATURE: Leave blank., to be completed by the functional OPR's supervisor when form is finalized.
17b - DATE SIGNED: Leave blank, same as instructions for Block 17a.

Blocks 18a and b - DOD COMPONENT AND/OR COMMAND FORMS MANAGEMENT OFFICER: Leave blank, the base forms manager will obtain if required.

Blocks 19a, b, and c - APPROVING FORMS MANAGEMENT OFFICER: Leave blank, the base forms manager will complete when form is approved for finalization.

REVERSE - FORMS PROCESSING INFORMATION *(Continued)***:**

Block 1 - TYPE OF FORM: Hill AFB forms are considered to be Headquarters forms.

Block 2 - STATUS: Indicate whether form is to be a permanent, one-time or a test form.
• *Permanent form - used on a continuous basis within two or more staff offices outside directorate level.*
• *One-time form - used to satisfy a one-time requirement, are not to be reprinted, and are obsolete when no longer needed.*
• *Test form - OPR gives enough test forms directly to the testing activities for them to complete the test. These forms are converted to a permanent form or declared obsolete at the end of the testing period. Test period not to exceed 1 year. An expiration date must be provided.*

Block 3 - HOW ISSUED: Place an "X" in appropriate block.
• *Computer generated forms - designed to be used with software other than the AF design standard forms software. Name of software must be identified.*
• *Electronic/LRA - AF standard forms design software for design of electronic forms is currently FormFlow by JetForm Corporation. Users must have a FormFlow Filler software package to utilize these forms.*

Block 4 - TYPE OF FILE USED FOR COMPLETED FORMS: Place an "X" in the appropriate box.

Block 5 - NO. COPIES FILLED IN AT ONE TIME: This is determined by the forms construction (i.e., cutsheet or set).

Block 6 - ESTIMATED USE PER MONTH: For revised Hill AFB forms, OPRs may contact the base forms manager for usage statistics.

Block 7 - IS FORM ACCOUNTABLE?: A form is accountable when it requires safeguarding sensitive or classified information other than Privacy Act data. Accountable forms are required to be serially numbered.

Block 8 - TYPE(S) OF USING ACTIVITIES: Enter the organizations that will be using the form.

Block 9 - IS SIGNATURE AUTHENTICATION REQUIRED ON FORM?: Leave blank *(not required)*

Block 10 - IF YOU ARE REVISING A PRESCRIBED FORM, DOES YOUR DIRECTIVE REQUIRE A CHANGE?: Place an "X" in the appropriate block, self explanatory.

Block 11 - *(Complete Items 11 and 12 if form not stocked by PDO):* Hill AFB forms are no longer stocked nor issued by the Base Publishing Distribution Office (PDO). If the form is not approved for electronic generation it will be stocked and used or stocked and issued by the forms OPR. It will be the OPR's responsibility to replenish stock - for stock replenishment *(reproduction)* a printing request will be initiated by the issuing or using organization and sent to 75 CS/SCSP for approval.

Block 12 - DELIVER TO: Only to be completed if Block 11 is filled in.

PRINTING SPECIFICATIONS
Only the printing specification blocks applicable to your printing needs need to be filled in. These blocks are also required to be completed for design/revision of an electronic form.

Block 13 - TRIM SIZE: Self-explanatory.

Block 14 - FOLD TO: Self-explanatory.

Block 15 - NO. OF PAGES: When printing on both sides (front and back) of a form it is to be considered as 2 pages.

Block 16 - QUANTITY REPRODUCED ON INITIAL PRINTING: This will be the quantity you will want printed upon finalization of form.

Block 17 - QUANTITY IN: Place an "X" in the appropriate box.

Block 18 - PAPER STOCK: The paper stock normally used for printing forms is identified below.
>•**BASIC WEIGHT:** Bond paper's basic weight is #20.
>•**KIND:** Kind of paper is bond.
>•**COLOR:** Color of paper is white.

Note: For cards the kind of paper normally used is either card stock or index cards.

Block 19 - PRINT:
>•**COLOR INK:** Color of ink for text is black
>•**FACE ONLY:** Normally used for one-paged forms *(text to be printed only on the front of the form)*
>•**HEAD TO:**
>•**HEAD:** Head to head are when the top of the front of the form and the top of the back of form is to be matched.
>•**FOOT:** Head to foot are when the top of the front of the form and bottom of the back of the form is to be matched.
>•**LEFT:** Head to left is when you match the top of the front of the form to the left side of the back of the form.
>•**RIGHT:** Head to right is when you match the top of the front of the form to the right side of the back of the form.

Block 20 - BINDING: Place an "X" in the appropriate block.

Block 21 - PUNCHING: Place an "X" in the appropriate block.

Block 22 - PERFORATION: Place an "X" in the appropriate block.

Block 23 - SCORE: Place an "X" in the appropriate block.

Block 24 - SERIALLY NUMBERED: Serial numbering is only required if form is to be an accountable form.

ELECTRONIC FORMS PROCESSING INFORMATION

Block 25 - FORM IS DESIGNED ONLY AS A TEMPLATE FOR FILL IN?: Leave blank, to be completed by base forms manager upon finalization of form.

Block 26 - DEVELOP HELP SCREENS FOR FORM?: Leave blank, to be completed by base forms manager upon finalization of form.

Block 27 - UNLOCKED VERSION OF FORM IS APPROVED FOR DISTRIBUTION?:
Leave blank, to be completed by base forms manager upon finalization of form. Unlocked

versions of Hill AFB electronic forms will not be released without full justification and written approval from the forms OPR.

Block 28 - REMARKS/ADDITIONAL SPECIFICATIONS: Provide remarks and/or additional specification/instructions for design and/or printing of form *(if applicable).*